

# Anticipatory Income Tax Statement for the Financial Year 2024-25

(Assessment Year 2025-2026)

Name of Employee:

PAN:

Designation:

Office:

Category: Individual (Age: below 60 years)

Income Tax Slab: OLD Regime

to be furnished by the employees / officers whose income exceeds Rs. 2,50,000/-

|                                                                                  |                                                                                                     |                                                                                                                                                        |                                   |  |
|----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|--|
| 1                                                                                | a                                                                                                   | Gross Salary / Pension for the month : (includes Basic Pay, DA, HRA, CCA, Interim Relief, OT Allowance, Deputation Allowance, Medical Allowance, etc.) |                                   |  |
|                                                                                  |                                                                                                     | March - 2024                                                                                                                                           |                                   |  |
|                                                                                  |                                                                                                     | April - 2024                                                                                                                                           |                                   |  |
|                                                                                  |                                                                                                     | May - 2024                                                                                                                                             |                                   |  |
|                                                                                  |                                                                                                     | June - 2024                                                                                                                                            |                                   |  |
|                                                                                  |                                                                                                     | July - 2024                                                                                                                                            |                                   |  |
|                                                                                  |                                                                                                     | August - 2024                                                                                                                                          |                                   |  |
|                                                                                  |                                                                                                     | September - 2024                                                                                                                                       |                                   |  |
|                                                                                  |                                                                                                     | October - 2024                                                                                                                                         |                                   |  |
|                                                                                  |                                                                                                     | November - 2024                                                                                                                                        |                                   |  |
|                                                                                  |                                                                                                     | December - 2024                                                                                                                                        |                                   |  |
|                                                                                  |                                                                                                     | January - 2025                                                                                                                                         |                                   |  |
|                                                                                  |                                                                                                     | February - 2025                                                                                                                                        |                                   |  |
|                                                                                  |                                                                                                     | b                                                                                                                                                      | Leave Surrender                   |  |
|                                                                                  | c                                                                                                   | Festival Allowance / Bonus / Ex-gratia and Incentive                                                                                                   |                                   |  |
| d                                                                                | Pay Revision Arrears, DA Arrears, Other Arrears                                                     |                                                                                                                                                        |                                   |  |
| e                                                                                | Excess Pay drawn, Dies non, etc.                                                                    |                                                                                                                                                        |                                   |  |
| f                                                                                | Total Salary Income (a+b+c+d-e)                                                                     |                                                                                                                                                        |                                   |  |
| Deduct: HRA in the case of persons who actually incur expenditure by way of Rent |                                                                                                     |                                                                                                                                                        |                                   |  |
| 2                                                                                | i                                                                                                   | Actual HRA Received the year                                                                                                                           |                                   |  |
|                                                                                  | ii                                                                                                  | Actual rent paid in excess of 1/10 th of the salary (Basic Pay + DA)                                                                                   |                                   |  |
|                                                                                  | iii                                                                                                 | 40% of the salary (Basic Pay + DA)                                                                                                                     |                                   |  |
|                                                                                  | (i) to (iii) whichever is least is exempted                                                         |                                                                                                                                                        |                                   |  |
| 3                                                                                | Balance (1-2)                                                                                       |                                                                                                                                                        |                                   |  |
| 4                                                                                | Deduct:                                                                                             | a                                                                                                                                                      | Standard Deduction (Rs. 50,000/-) |  |
|                                                                                  |                                                                                                     | b                                                                                                                                                      | Conveyance Allowance              |  |
|                                                                                  |                                                                                                     | c                                                                                                                                                      | Profession Tax Paid               |  |
| 5                                                                                | Net Salary Income (3-4)                                                                             |                                                                                                                                                        |                                   |  |
| 6                                                                                | Housing Loan Interest - Max : Rs. 2 Lakh (Additional Rs. 1.5 Lakh under Section 80EEA)              |                                                                                                                                                        |                                   |  |
| 7                                                                                | Any other income (Business, Capital Gains or Other Sources)                                         |                                                                                                                                                        |                                   |  |
| 8                                                                                | Gross Total Income (5-6+7)                                                                          |                                                                                                                                                        |                                   |  |
| 9                                                                                | (a) Health Insurance - Mediciam (maximum of Rs.25,000 / 50,000 + parents Rs.25,000 / 50,000)        |                                                                                                                                                        |                                   |  |
|                                                                                  | (b) Expense on treatment of mentally or physically handicapped dependents                           |                                                                                                                                                        |                                   |  |
|                                                                                  | (c) Expenditure on medical treatment of the employee for specified diseases                         |                                                                                                                                                        |                                   |  |
|                                                                                  | (d) Interest on Educational Loan for higher education for self or dependent children                |                                                                                                                                                        |                                   |  |
|                                                                                  | (e) Donation to various charitable and other funds including PMs National Relief Fund               |                                                                                                                                                        |                                   |  |
|                                                                                  | (f) Contribution made to political party / electoral trust                                          |                                                                                                                                                        |                                   |  |
|                                                                                  | (g) Deduction for person with disability (Rs. 75,000; if disability over 80% Rs. 1.25 lakh)         |                                                                                                                                                        |                                   |  |
|                                                                                  | (h) Subscription to long term infrastructure Bonds u/s.80CCF (max. Rs. 20,000/-)                    |                                                                                                                                                        |                                   |  |
|                                                                                  | (i) Remaining Contribution to NPS (Max Rs.50,000)                                                   |                                                                                                                                                        |                                   |  |
|                                                                                  | (j) Interest paid for Electric Vehicle Loan (Max : Rs. 1.5 Lakh)                                    |                                                                                                                                                        |                                   |  |
|                                                                                  | (k) Interest income from SB, Fixed deposit,... (Max : Rs.10,000/- ; Rs.50,000/- for senior citizen) |                                                                                                                                                        |                                   |  |
|                                                                                  | (l)                                                                                                 |                                                                                                                                                        |                                   |  |
| (m)                                                                              |                                                                                                     |                                                                                                                                                        |                                   |  |
| TOTAL                                                                            |                                                                                                     |                                                                                                                                                        |                                   |  |

|    |                                                                                     |          |
|----|-------------------------------------------------------------------------------------|----------|
|    | <b>Deductions under section 80C, 80CCC, 80CCD [max. Rs. 1,50,000/-]</b>             |          |
|    | (a) Life Insurance premia of self, spouse or children                               |          |
|    | (b) Purchase of NSC VIII issue                                                      |          |
|    | (c) Contribution to GPF (Subscription, DA Arrear, Pay Revision Arrear, etc)         |          |
|    | (d) Contribution to SLI, GIS, FBS, GPAIS, etc (Total)                               |          |
|    | (e) Term deposit with Scheduled Bank for a fixed period of not less than 5 years    |          |
|    | (f) Purchase of tax saving units of Mutual Fund or UTI                              |          |
|    | (g) Tution fees for full-time education to any 2 children                           |          |
|    | (h) Housing Loan Repayment (Principal) and Stamp duty paid for purchase of property |          |
| 10 | (i) Subscription to equity shares or debentures of an eligible issue                |          |
|    | (j) Contribution to PPF account of Self, Spouse or Children                         |          |
|    | (k) Subscription of Infrastructure Bonds of NABARD                                  |          |
|    | (l) Deposit under Senior Citizen Saving Scheme                                      |          |
|    | (m) Five year Time Deposit in Post Office                                           |          |
|    | (n) Contribution to NPS (Max 10% of Basic+DA)                                       |          |
|    | (o) Payment to Annuity Plan of Pension fund like LIC                                |          |
|    | (p)                                                                                 |          |
|    | (q)                                                                                 |          |
|    | <b>TOTAL</b>                                                                        |          |
| 11 | <b>Total Income rounded off to nearest multiple of ten rupees ( 8 - 9 - 10 )</b>    |          |
| 12 | <b>Tax on Total Income</b>                                                          |          |
| 13 | <b>Less: Rebate for the Income upto 5 Lakhs u/s 87 A (Max Rs. 12,500/-)</b>         |          |
| 14 | <b>Income tax after Rebate ( 12 - 13 )</b>                                          |          |
| 15 | <b>Surcharge [ 10% of (14) if (11) &gt; 50 lakh; 15% if (11) &gt; 1 crore ]</b>     |          |
| 16 | <b>Health and Education Cess [ @ 4% of (14+15) ]</b>                                |          |
| 17 | <b>Total Tax Payable ( 14 + 15 + 16 )</b>                                           |          |
| 18 | <b>Less: Relief for arrears of salary u/s. 89(1)</b>                                |          |
| 19 | <b>Balance Tax Payable ( 17 - 18 )</b>                                              |          |
| 20 | <b>Income tax deducted from salary, Advance tax paid</b>                            |          |
| 21 | <b>Balance Income Tax to be paid</b>                                                | <b>0</b> |
| 22 | <b>Income Tax to be deducted monthly - 10 installments (Rounded up to 100)</b>      |          |

Place:

Signature:

Date: